

Purpose

Use this procedure to create and add a dependent to an employee's current health plan.

Prerequisites

- Employee is currently enrolled into a health and/or life plan.
- The Fringe Benefits Management Company (FBMC) requires an approved Family Status Change request before a change is made to an employee's health plan deductions.

Menu Path

Use the following menu path(s) to begin the transactions:

- **PA30** - Human Resources → Personnel Management → Administration → HR Master Data → PA30-Maintain
- **HRBEN0001** - Human Resources → Personnel Management → Benefits → HRBEN0001-Enrollment

Transaction Code

PA30/HRBEN0001

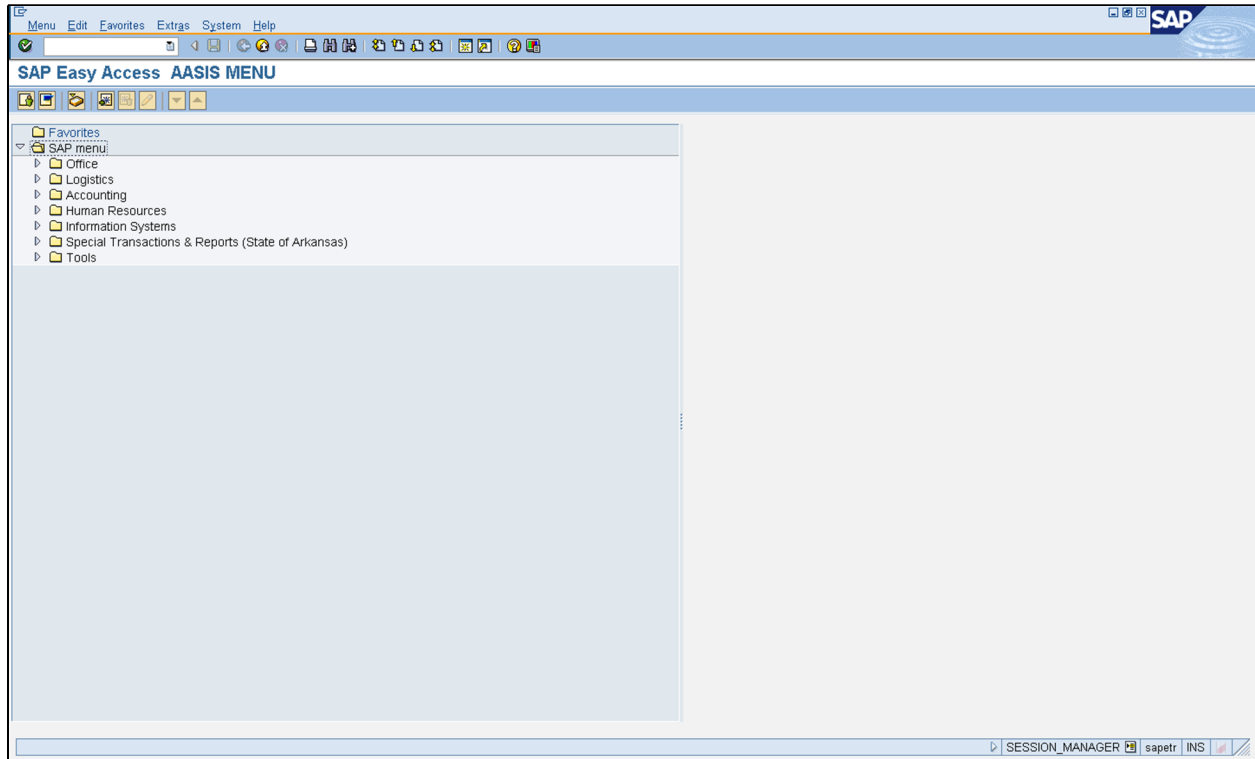
Tips and Tricks

- Create **Family Member/Dependent record (IT0021)** with the start date which must be the 1st day of the month the coverage is be effective.
- The Adjustment Reason - **Family Status Change (IT0378)** is automatically created after a Family Member/Dependent record (IT0021) is created.
- To view the Family Status Change (IT0378) adjustment reason, select IT0378 and the display icon. The start date is the same date as the Family Member/Dependent record (IT0021) start date.
- If the employee has proof of other dependents not previously covered, they may also be added to their benefit plan.

Procedure

1. Start the transaction using the menu path or transaction code.

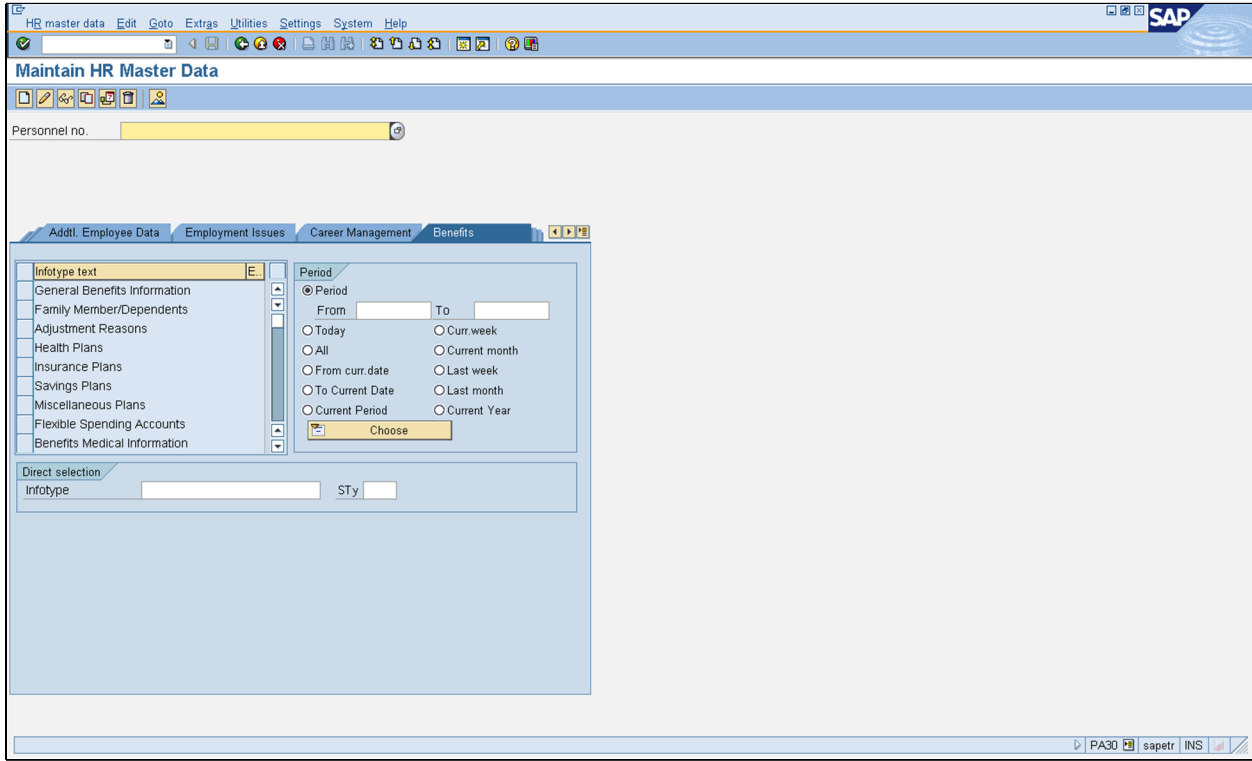
SAP Easy Access AASIS MENU



2. As required, complete/review the following fields:



Field	R/O/C	Description
Command Field	Required	Enter Maintain HR Master Data transaction. Example: PA30

Maintain HR Master Data










3. As required, complete/review the following fields:

Field	R/O/C	Description
Personnel no.	Required	Enter the employee's personnel number . Example: 1146

4. Click to select the **Family Member/Dependents** infotype .
5. Click **Create** .

Subtypes for infotype "Family Member/Dependents" (1) 15 Entries found

Subtypes for infotype "Family Member/Dependents" (1) 15 Entries found	
Restrictions	
      	
STyp	Name
1	Spouse
10	Divorced spouse
11	Father
12	Mother
13	Stepson
14	Stepdaughter
15	Newborn
2	Child
3	Court Appointed
4	Adopted Child
5	Guardian
6	Stepchild
7	Emergency contact
8	Related persons
9	Other
15 Entries found	

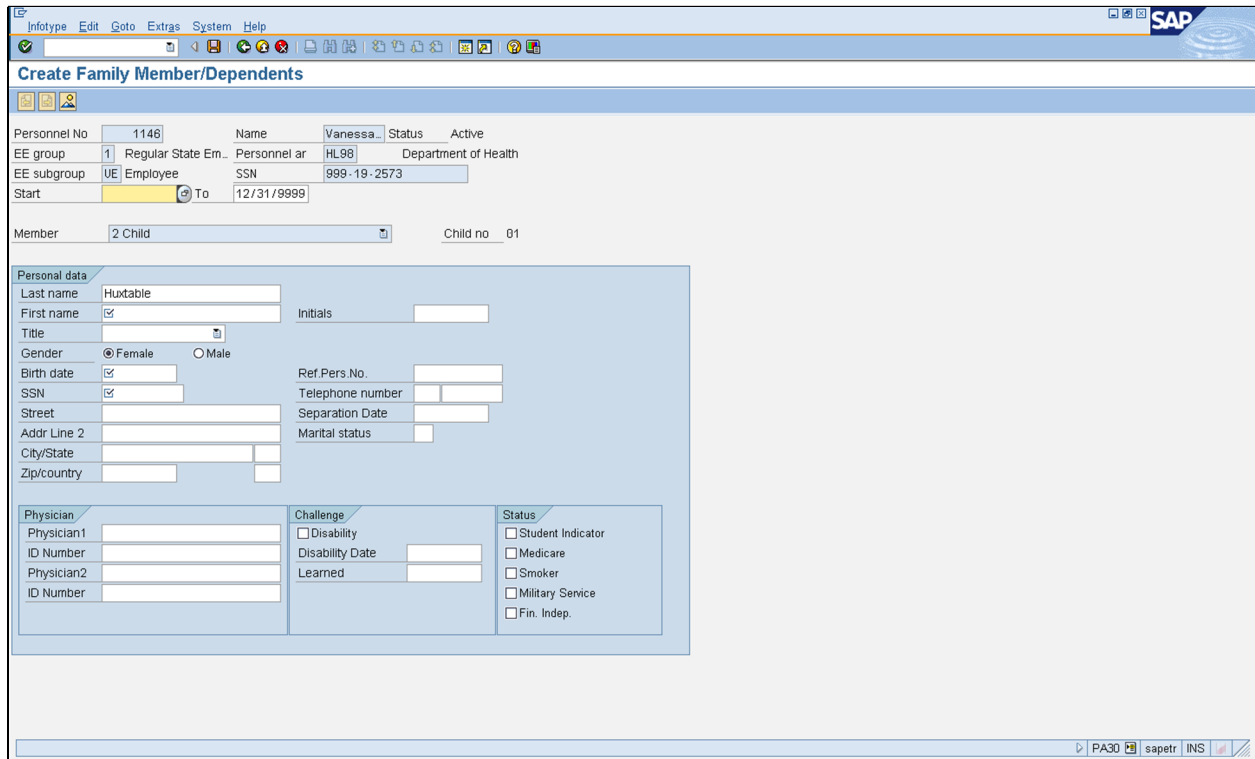
- Click desired **Family Member/Dependent**. Example: Child



NOTE: For newborns, the subtype should be 'child'.

- Click **Copy** .

Create Family Member/Dependents



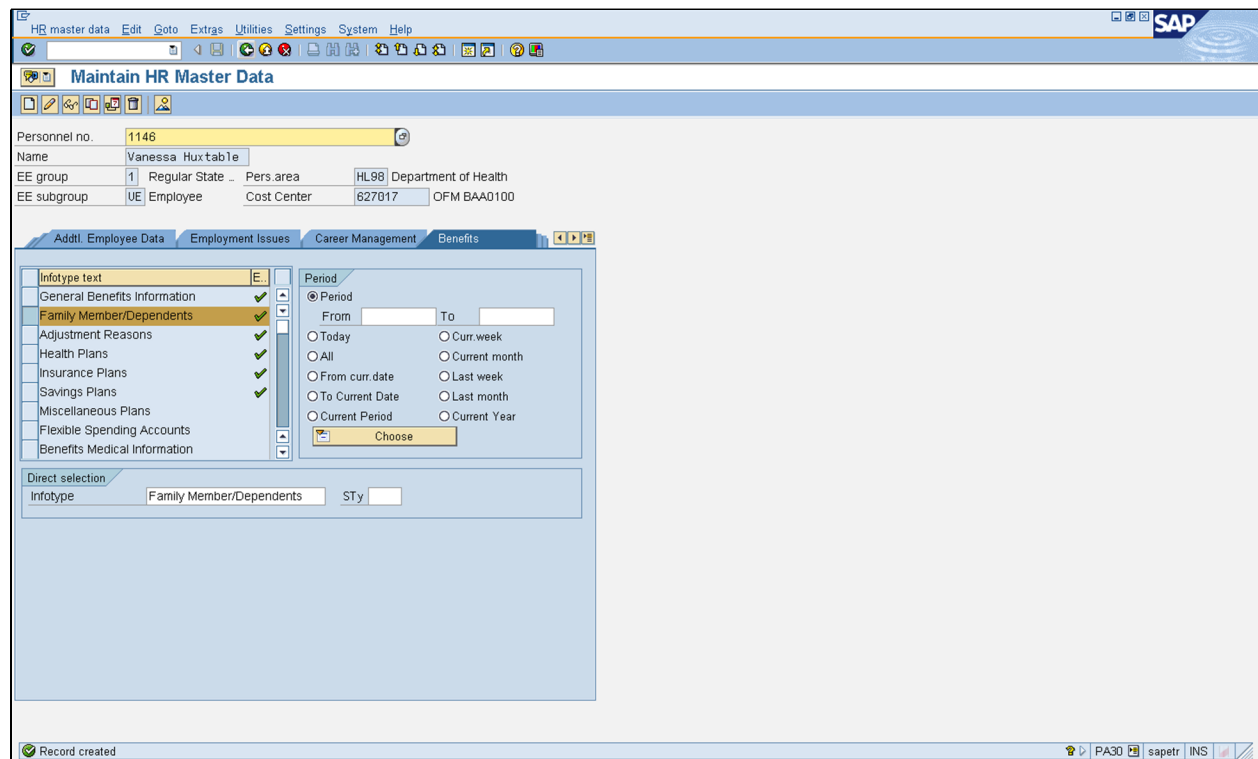
8. As required, complete/review the following fields:

Field	R/O/C	Description
Start	Required	Enter the 1st of the month in which the event occurred. Example: 06012010
First name	Required	Enter the first name of the employee's child. Note: If the last name of the child is different from the employee, delete and enter the correct last name. Example: Rudy
Birth date	Required	Enter the dependent's date of birth. Example: 06242010


Field	R/O/C	Description
SSN	Required	<p>Enter the dependents social security number (SSN).</p> <p>If the SSN has not been provided, type in the default numbers until the employee receives one for the dependent.</p> <ul style="list-style-type: none"> Default SSN for newborn: 888-and the last six digits of the employee's SSN. Default SSN for twin: 888-88-last four digits of the employee's SSN. <p>NOTE: The correct dependent SSN must be replaced as soon as it becomes available.</p> <p>Example: 888-19-2573</p>

9. Click Save .

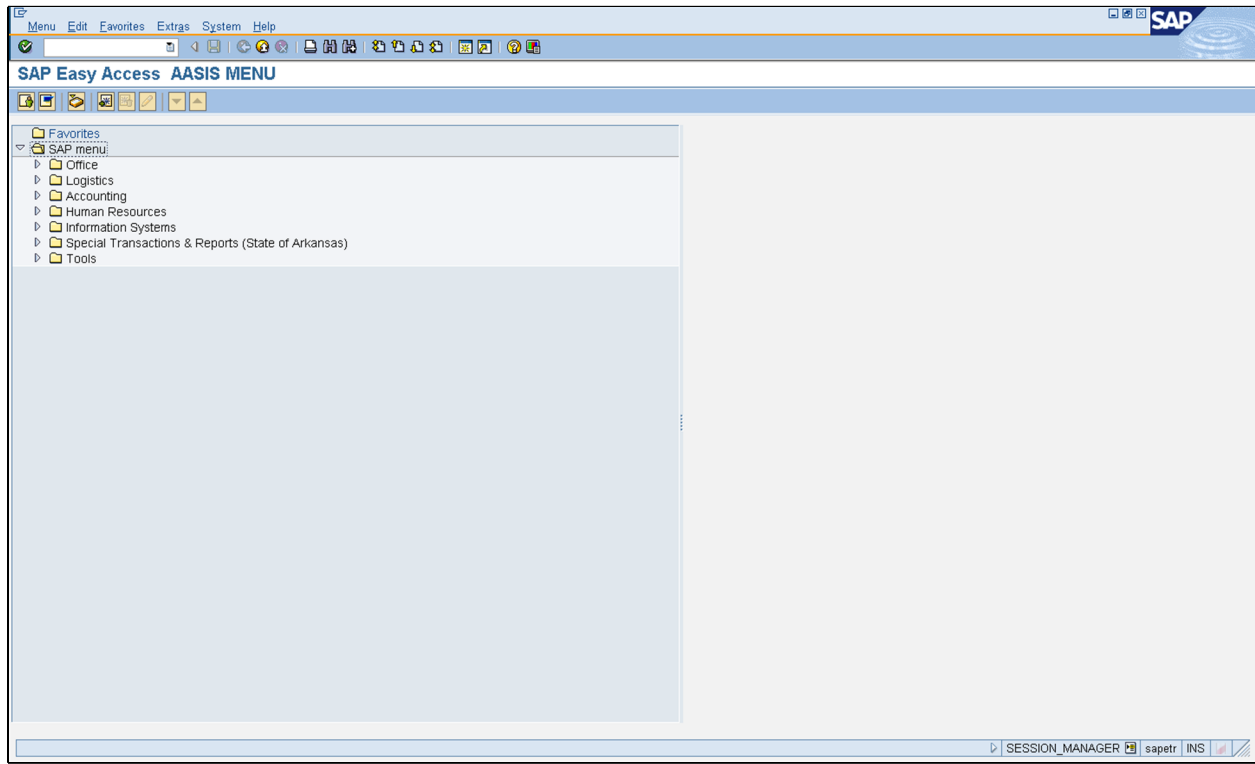
Maintain HR Master Data



The screenshot shows the SAP 'Maintain HR Master Data' interface. At the top, there's a menu bar with 'HR master data', 'Edit', 'Goto', 'Extras', 'Utilities', 'Settings', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main area displays the 'Maintain HR Master Data' title and a list of fields for 'Personnel no.' (1146), 'Name' (Vanessa Huxtable), 'EE group' (1 Regular State ...), 'Pers. area' (HL98 Department of Health), 'EE subgroup' (UE Employee), and 'Cost Center' (627017 OFM BAA0100). Below this, there are tabs for 'Addtl. Employee Data', 'Employment Issues', 'Career Management', and 'Benefits'. The 'Employment Issues' tab is active, showing a list of infotypes on the left and a 'Period' selection area on the right. The 'Infotype text' field is set to 'E.'. The 'Period' section has radio buttons for 'Today', 'All', 'From curr. date', 'To Current Date', 'Current Period', 'Curr. week', 'Current month', 'Last week', 'Last month', and 'Current Year'. A 'Choose' button is at the bottom of the period selection area. At the bottom of the screen, a status bar shows 'Record created' and system information like 'PA30', 'sapetr', and 'INS'.

10. Click Back  to return to previous screen.

SAP Easy Access AASIS MENU



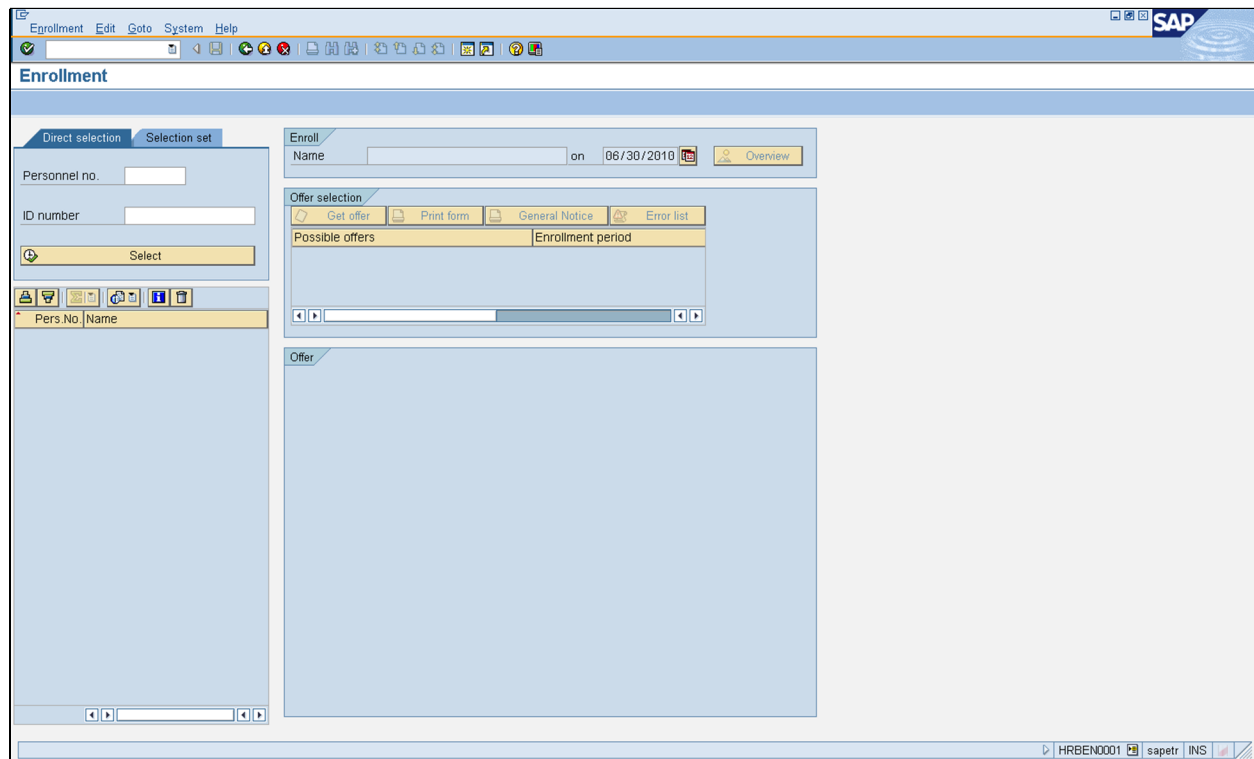
11. As required, complete/review the following fields:

Field	R/O/C	Description
Command Field	Required	Enter the Enrollment transaction Example: HRBEN0001

12. Click Command Field text box .

13. Press "Enter".

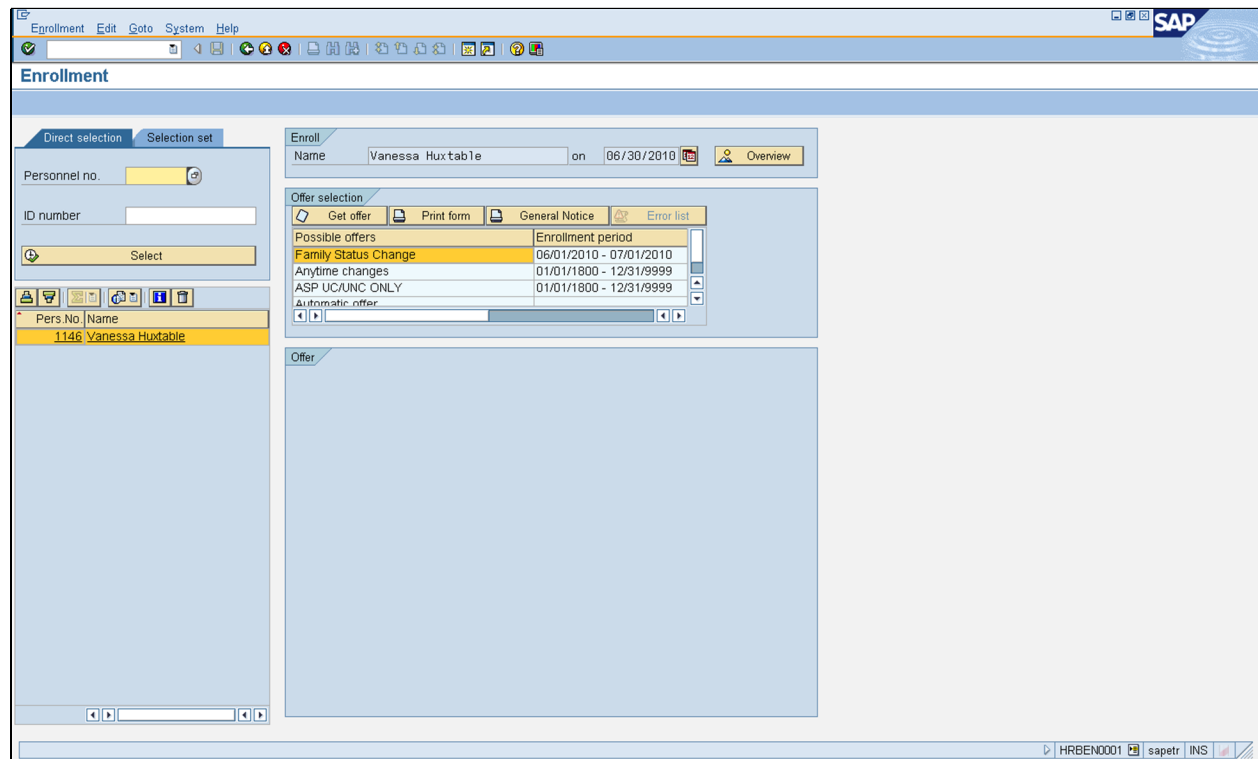
Enrollment



14. As required, complete/review the following fields:

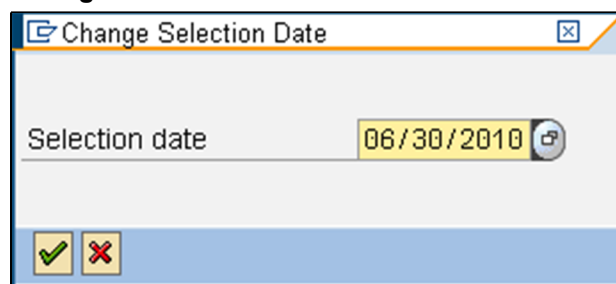
Field	R/O/C	Description
Personnel no.	Required	Enter the employee's personnel number . Example: 1146

Enrollment



15. Click **Change date** .

Change Selection Date

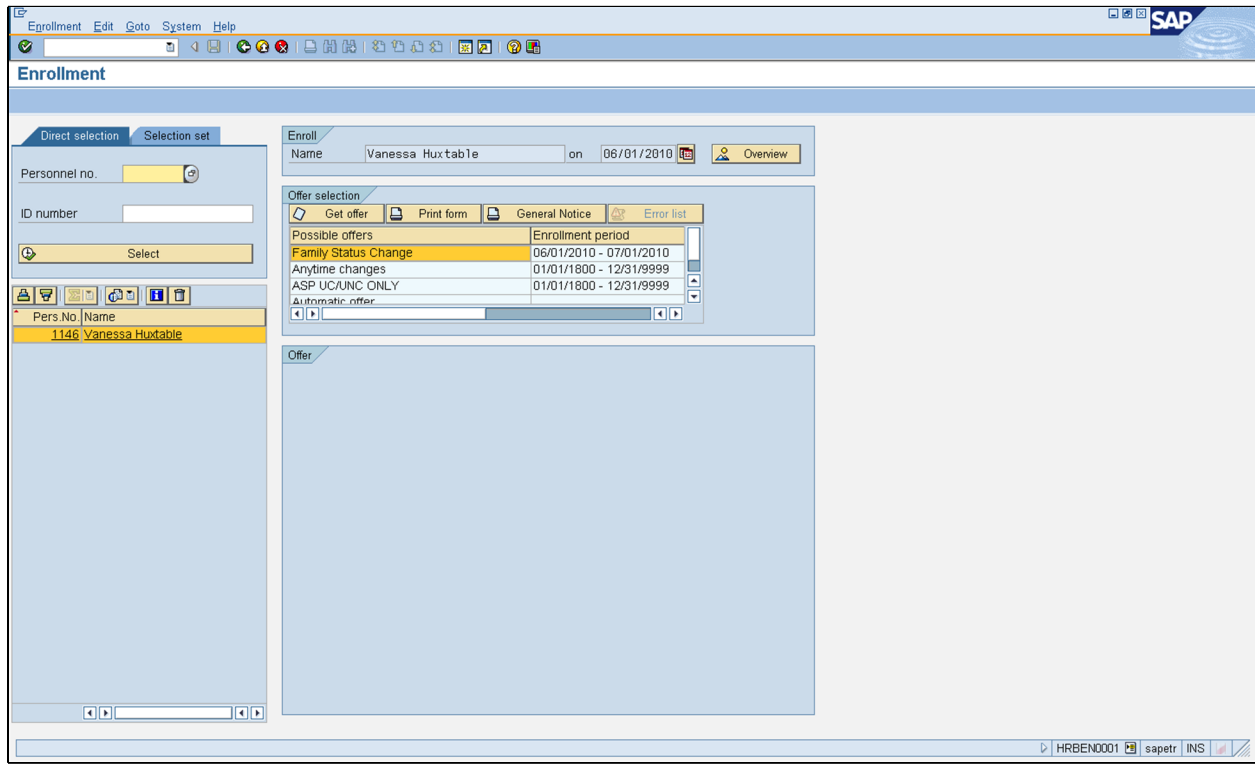


16. As required, complete/review the following fields:

Field	R/O/C	Description
Selection date	Required	The Change date should be the same date as the Family Member/Dependent's effective date which is the 1st day of the month the event occurred Example: 06012010

17. Click **Continue** .

Enrollment



The screenshot shows the SAP Enrollment Selection Set screen. The left sidebar contains a list of personnel with the following details:

Pers.No	Name
1146	Vanessa Huxtable

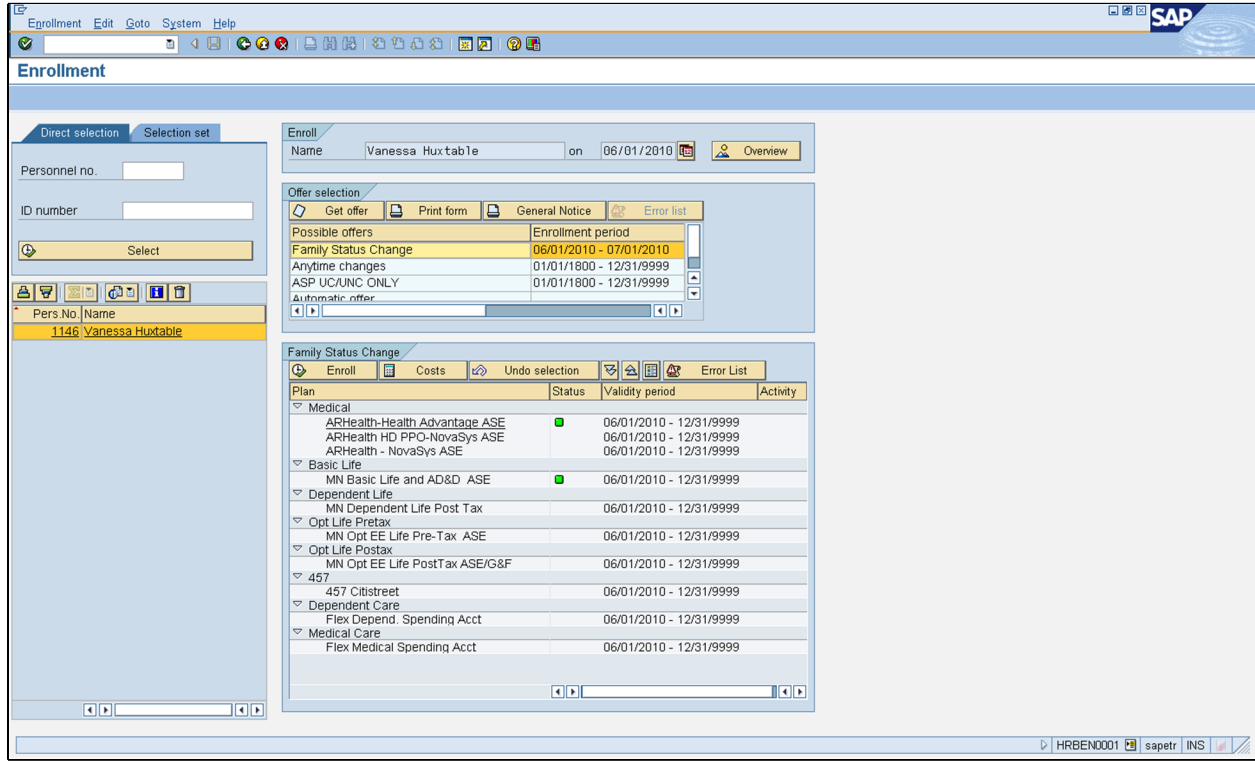
The main area displays the enrollment details for Vanessa Huxtable, effective on 06/01/2010. The 'Offer selection' section includes the following information:

Possible offers	Enrollment period
Family Status Change	06/01/2010 - 07/01/2010
Anytime changes	01/01/1800 - 12/31/9999
ASP UCA/INC ONLY	01/01/1800 - 12/31/9999

The 'Automatic offer' section is currently empty.

18. Double-click *Possible offers* text box **Family Status Change**.

Enrollment



The screenshot shows the SAP Enrollment Selection Set screen for employee Vanessa Huxtable. The screen is divided into several sections:

- Left Panel:** Contains fields for Personnel no., ID number, and a list of personnel. The list shows "1146 Vanessa Huxtable" selected.
- Top Panel:** Shows the employee's name "Vanessa Huxtable" and the enrollment date "06/01/2010".
- Offer selection:** A table showing possible offers and their enrollment periods.

Possible offers	Enrollment period
Family Status Change	06/01/2010 - 07/01/2010
Anytime changes	01/01/1800 - 12/31/9999
ASP UCA/INC ONLY	01/01/1800 - 12/31/9999
- Family Status Change:** A table showing the status and validity period of various health plans.

Plan	Status	Validity period
Medical		
ARHealth-Health Advantage ASE	■	06/01/2010 - 12/31/9999
ARHealth HD PPO-NovaSys ASE		06/01/2010 - 12/31/9999
ARHealth - NovaSys ASE		06/01/2010 - 12/31/9999
Basic Life		
MN Basic Life and AD&D ASE	■	06/01/2010 - 12/31/9999
Dependent Life		
MN Dependent Life Post Tax		06/01/2010 - 12/31/9999
Opt Life Pretax		
MN Opt EE Life Pre-Tax ASE		06/01/2010 - 12/31/9999
Opt Life Posttax		
MN Opt EE Life PostTax ASE/G&F		06/01/2010 - 12/31/9999
457		
457 Citistreet		06/01/2010 - 12/31/9999
Dependent Care		
Flex Depend. Spending Acct		06/01/2010 - 12/31/9999
Medical Care		
Flex Medical Spending Acct		06/01/2010 - 12/31/9999

19. Select the health plan into which the employee is currently enrolled.



The employee's health plan will have a green box as the status to indicate enrollment. A pop-up box will appear for the chosen plan.

Maintain Health Plan

Maintain Health Plan

Pers.No. 1146 Vanessa Huxtable
Plan ARHealth-Health Advantage ASE
Start 06/01/2010 - 12/31/9999

☐ Stop participation in period

Option

Dependents

Plan options

Health Plan Opt OPT1 Standard ASE 1
Dependent Cover EE1 Employee Only 1

Costs USD Monthly

EE pre-tax 95.78
Employer 0.00

Accept

20. Select **Dependents** tab **Dependents**.

Maintain Health Plan

Maintain Health Plan

Pers.No. 1146 Vanessa Huxtable
Plan ARHealth-Health Advantage ASE
Start 06/01/2010 - 12/31/9999

☐ Stop participation in period

OptionDependents

Select.	Name	Type of dep./ben.
<input type="checkbox"/>	Rudy Huxtable	Child

Accept

21. Click check box ☐ to select the dependent.

22. Select **Option** tab **Option**.

Maintain Health Plan

Maintain Health Plan

Pers.No. 1146 Vanessa Huxtable
Plan ARHealth-Health Advantage ASE
Start 06/01/2010 - 12/31/9999

☐ Stop participation in period

Option

Dependents

Plan options

Health Plan Opt OPT1 Standard ASE 1
Dependent Cover EE1 Employee Only 1

Costs USD Monthly

EE pre-tax 95.78
Employer 0.00

Accept

23. Click **Dependent Cover** drop-down to select the correct coverage.

Maintain Health Plan

Maintain Health Plan

Pers.No. 1146 Vanessa Huxtable
Plan ARHealth-Health Advantage ASE
Start 06/01/2010 - 12/31/9999

☐ Stop participation in period

Option

Dependents

Plan options

Health Plan Opt OPT1 Standard ASE 1
Dependent Cover EE1 Employee Only 1
EC1 Emp + Child(ren) 1
EE1 Employee Only 1

Costs USD Monthly

EE pre-tax 95.78
Employer 0.00

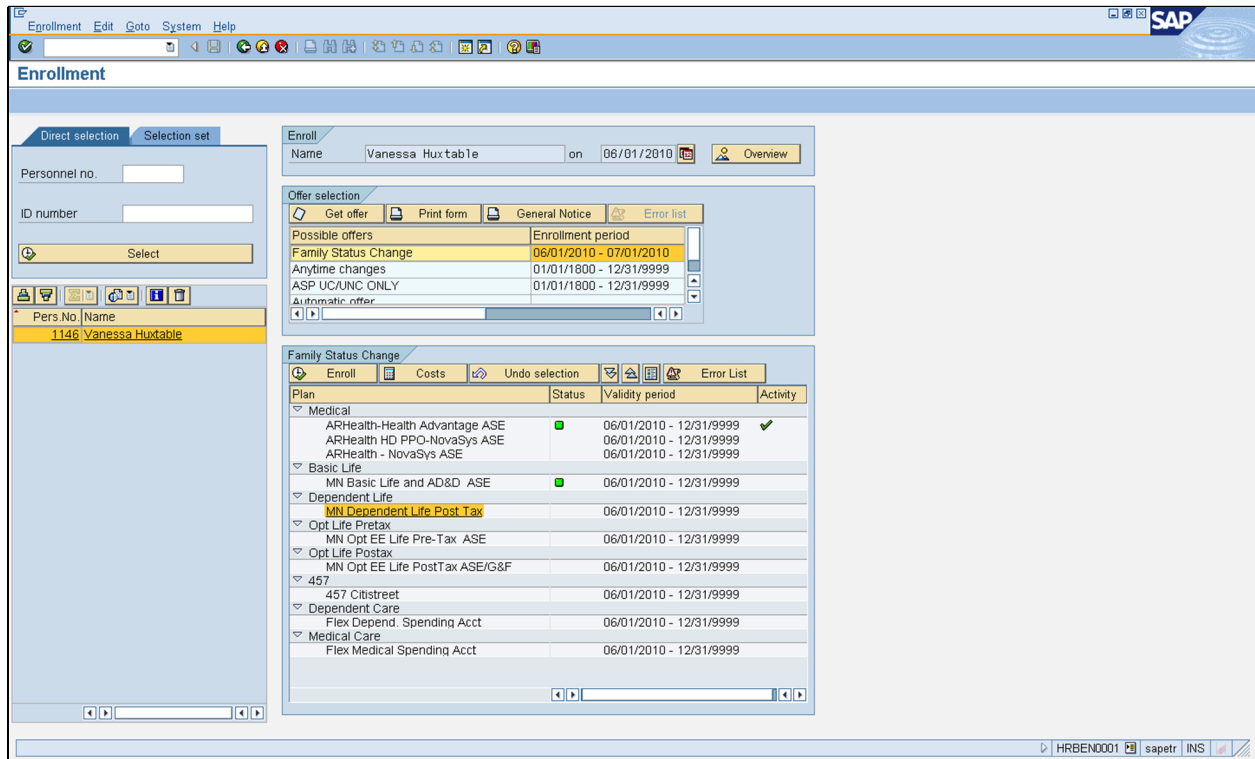
Accept

✖

24. Select the appropriate **dependent coverage** based on enrolled employee/dependents.

25. Click **Accept** .

Enrollment



Enrollment

Enrollment Edit Goto System Help

Personnel no.

ID number

Select

Pers.No Name

1146 Vanessa Huxtable

Enroll Name Vanessa Huxtable on 06/01/2010 Overview

Offer selection

Get offer Print form General Notice Error list

Possible offers Enrollment period

Family Status Change 06/01/2010 - 07/01/2010

Anytime changes 01/01/1800 - 12/31/9999

ASP UCA/INC ONLY 01/01/1800 - 12/31/9999

Automatic offer

Family Status Change

Enroll Costs Undo selection Error List


Plan	Status	Validity period	Activity
Medical			
ARHealth-Health Advantage ASE	■	06/01/2010 - 12/31/9999	✓
ARHealth HD PPO-NovaSys ASE		06/01/2010 - 12/31/9999	
ARHealth - NovaSys ASE		06/01/2010 - 12/31/9999	
Basic Life			
MN Basic Life and AD&D ASE	■	06/01/2010 - 12/31/9999	
Dependent Life			
MN Dependent Life Post Tax		06/01/2010 - 12/31/9999	
Opt Life Pretax			
MN Opt EE Life Pre-Tax ASE		06/01/2010 - 12/31/9999	
Opt Life Posttax			
MN Opt EE Life PostTax ASE/G&F		06/01/2010 - 12/31/9999	
457			
457 Citistreet		06/01/2010 - 12/31/9999	
Dependent Care			
Flex Depend. Spending Acct		06/01/2010 - 12/31/9999	
Medical Care			
Flex Medical Spending Acct		06/01/2010 - 12/31/9999	

HRBEN0001 sapetr INS

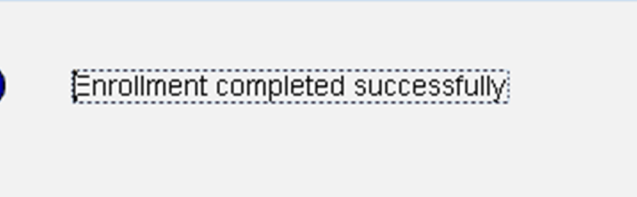
26. Click **Enroll**  **Enroll**.

Confirmation of Selected Actions

[illegible]

27. Click **Enroll**  to complete the process.

Desktop



The screenshot shows a window titled "Enrollment" with a close button in the top right corner. On the left side, there is a blue circular icon containing a white lowercase letter 'i'. To the right of this icon, the text "Enrollment completed successfully" is displayed within a dashed rectangular border. At the bottom of the window, there are two buttons: "Continue" and "Confirmation". The "Confirmation" button features a printer icon to its left.

28. Click **Continue**  to complete the process.



The Confirmation letter may be printed for the employee to view by clicking **Confirmation**.



Next Steps

Employee should receive a copy of their Confirmation letter within 30 days of enrollment to ensure all plans are correct.

To print Confirmation letter displaying the employee's catch-up amounts for health and/or life plans, go to transaction **HRBEN0015**.



Summary

You have successfully completed a Family Status Change.